

# User Guide

- Review the Lessons Learned Questionnaire before completing the Case Study Template
- 1. Provide name of the organization and the specific initiative. This information will be used to tie an organization to a specific initiative specially in cases where we will have more than one Case Study for a specific initiative. Refer to the [Example Case Study](#)
- 2. Describe the Key Benefit to the organization which resulted from completing the initiative. Key Benefit MUST be quantifiable and measurable.
- 3. Provide a short organizational background. Include information such as annual revenue, number of employees, diversity of operations etc.,
- 4. Provide a short description (4-5 lines) of the challenges and main drivers behind this initiative. This could include financial challenges, regulatory requirements, or operational constraints.
- 5. Provide a short description (4-5 lines) of the organization's approach to resolving the issues and addressing the challenges. Include a short description of the technology and processes used in achieving the initiative objectives.
- 6. Provide the date where the interview was conducted

**{Name of the organization,  
and the specific initiative}**

**example:**

**DuPont, Enterprise SAP  
Implementation**

1

3

**{Key Benefit}**

**example:**

**DuPont Achieved 20%  
cost savings through  
Business Process  
Transformation**

2

## **Background**

*Provide a short background of the organization (i.e., DuPont or Boeing) and the specific initiative.*

## **Challenges**

4

*Provide a short description of the specific challenges the organization was facing. Include organizational, operational and financial issues.*

5

## **Resolution and Benefits**

*Describe organization's approach in resolving the issues and ways they overcome the challenges. Identify benefits gained by the specific initiative. Include both financial and non-financial benefits*

6

**{Date the interview was  
conducted, MM,DD,YYYY}**